



STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS

Department of Administration  
DIVISION OF PURCHASES  
One Capitol Hill  
Providence, RI 02908-5855

Tel: (401) 222-2317  
Fax: (401) 222-6387  
TDD: (401) 222-1228  
Web Site: [www.purchasing.state.ri.us](http://www.purchasing.state.ri.us)

29 March 00

**Addendum #1**

**RFP # 10481 – Telephone Services / Toll & Billing Services**

Opening Date and Time: 27 April 00 at 2:00 PM

- PRE-BID MEETING HAS BEEN ADVANCED ONE DAY. The meeting is now scheduled for **11 April 00 at 2:45 PM** in the Department of Administration, Division of Purchases (2<sup>nd</sup> fl), One Capitol Hill, Providence, RI .

Jerome D. Moynihan, C.P.M., CPPO  
Administrator of Purchasing Systems



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11 April 00

**Addendum #2**

**RFP # 10481 – Telephone Services / Toll & Billing Services**

Opening Date and Time: 27 April 00 at 2:00 PM

- Accompanying information is released for review

Jerome D. Moynihan, C.P.M., CPPO  
Administrator of Purchasing Systems

Text for Addendum 2.0:

1) Correction: Delete sections 1.3.6 and 1.3.7. No surety or performance bond is required.

2) Section 1.4 Table: Add the following information:

	Kingston/NBC	Providence	West Greenwich
Number of Residence Hall Students (beds)	3800	0	0

3) The University expects that with 3800 residents in the dormitories for 9 months, and 100 per month in the summer, approximately 34,500 bills will be generated annually.

4) Clarification: Vendors have been instructed to submit full and complete responses to all sections of the RFP. However, it is understood that not all vendors will choose to respond to all of the sections 4 through 7.

All vendors must respond to sections 1, 2, and 3. If a proposal is being submitted for only a portion of the RFP (section 4,5,6 or 7 or any combination thereof), please provide full and complete responses for each section to which you are responding. For major sections to which a vendor does not intend to respond, vendor should reply with the phrase "No Bid". For Example, if you are not bidding on Section 4, your proposal should state: Section 4 Outsourced Billing: NO BID.

5) Section 4.4.3: Clarification: This itemization should include the cost per minute for the long distance services.

6) To assist in preparing your response, an electronic MS Word version of the RFP is available to vendors upon request. Requests should be e-mailed to [hdma@ids.com](mailto:hdma@ids.com) with the subject line: RFP 10481. Vendors using this file in their response should note: In the event of any errors or inconsistencies in their response between the reproduced RFP language and the original RFP as released in PDF format on the state purchasing web site, the PDF file will be the controlling document. Also note that RFP addenda will not be released in MS Word format, and it is the vendor's responsibility to include / merge addenda updates into their response.

7) Correction: Section 6.9, second paragraph can be deleted in its entirety. Traffic information for the other agencies is included in appendix B.



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12 April 00

**Addendum #3**

**RFP # 10481 – Telephone Services / Toll & Billing Services**

Opening Date and Time: 27 April 00 at 2:00 PM

- Accompanying information is released for review

Jerome D. Moynihan, C.P.M., CPPO  
Administrator of Purchasing Systems

Addendum 3.0:

- 1) For informational purposes, further demographic information on the URI community can be found at <http://www.uri.edu/spir>.
- 2) The deadline for written clarification questions has been extended to April 17, 2000, at 12:00 noon. Questions should be submitted in writing to Jerome Moynihan, Office of State Purchases. (Fax: 401-222-6387). Reference RFP #10481 on all correspondence.
- 3) The table of contents in the RFP is incorrect. Replace with attached TOC.
- 4) Section 6.9 State and Government agencies. Clarification: Each agency that may subscribe to services under this solicitation, while eligible for the same terms and rates as provided in vendor's proposal, shall be treated as a separate customer; they will receive their own bills, and be responsible for payment of these bills. Individual customers beyond the University of Rhode Island may include: Rhode Island College, Community College of Rhode Island, The State of Rhode Island, other state agencies, municipalities (I.e. Town of Warwick), etc.
- 5) Vendors are reminded to check the Office of Purchases web site for further addenda. (Further information will follow in Addendum 4 next week.)

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20 April 00

**Addendum #4**

**RFP # 10481 – Telephone Services / Toll & Billing Services**

Opening Date and Time: 27 April 00 at 2:00 PM

- Accompanying information (2 pages) is released for review
- No further questions will be entertained.

Jerome D. Moynihan, C.P.M., CPPO  
Administrator of Purchasing Systems



#### Addendum 4.0:

- 1) Section 4.3.2.3: International Plan. A request was made to provide a list of the Student's most commonly called international locations. See table below.
- 2) Section 4.8: Student Bill Collection: Question was submitted regarding whether the University has any mechanism in place to assist with collection activities with student accounts. Answer: The University does not assist in collection activities; this is the vendor's sole responsibility.
- 3) Section 4.2. Clarification: Vendor is responsible for all authorization/account code management for student accounts. This includes establishing the initial code, and activating/deactivating as appropriate during the term of service. These account codes can reside either in the Bell Atlantic Centrex system, or in the interstate carrier's system. In either case, the cost and responsibility for these functions are the vendor's responsibility. Please be sure to include a detailed explanation of how vendor will perform these functions in your response.
- 4) Section 5.3.1: System Administration: A question was submitted regarding the number of URI staff members that will be using the TMS system. Answer: The University estimates that there will be eight staff members requiring access to the TMS system, at varying times, for administrative purposes, with up to three simultaneous users.
- 5) Section 5.3.1.1: Clarification: In the phrase "each terminal in use", the word "terminal" refers to the telephone set/computer/inventory item maintained through inventory functions, (not the administration terminal used to access the TMS).
- 6) Appendix A: Network Diagram. Clarification: The University currently collects and processes call records for administrative lines from two SMDR sources, the Kingston/NBC Centrex, and the Providence Centrex. Call record quantities are shown in the table below. URI also incorporates information on credit card, third person, toll free calls, etc. from carrier provided CD-ROM. Student call records are collected and processes separately by ACUS.
- 7) The State of Rhode Island General Terms and Conditions of Purchase can be found at: <http://www.purchasing.state.ri.us/gencond.htm>.

Table: Call records per site

	Providence		Kingston	
	Processed Calls	Raw Call Records	Processed Calls	Raw call records
February	19505	33133	193058	379582
January	15856	26935	135481	266377
December	17865	30347	160602	315769
November	17995	30568	197230	387785
October	23501	39921	221237	434987
September	24023	40808	168704	331699
August	17998	30573	40446	79523
July	10437	17729	69439	136528
June	23918	40630	179682	353283
End of May	5657	9610	34208	67258
May	22141	37611	216473	425620
April	23579	40054	242161	476127
March	20857	35430	201368	395921
Totals	243332	413350	2060089	4050458

Table: International Student Calling

Country	Approximate Annual Minutes Used
CANADA	6917
UNITED KINGDOM	4103
GERMANY, FED REP	1662
BERMUDA	1267
JAPAN	1216
Australia	917
ST KITSS & NEVIS	672
KENYA	545
Spain	527
Ireland	500
ECUADOR	461
FRANCE	449
Greece	414
ITALY	401
DOMINICAN REPUBLIC	283
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&lt;End Addendum 4&gt;



**Solicitation Information**  
**28 March 00**

**RFP # 10481**

**TITLE: Telephone Services / Toll & Billing Services**

**OPENING DATE AND TIME: 27 April 00 at 2:00 PM**

**PRE-BID/ PROPOSAL CONFERENCE: Yes    DATE: 12 April 00    TIME: 2:45 PM**

**MANDATORY : No**

**LOCATION: Department of Administration, Division of Purchases (2<sup>nd</sup> fl), One Capitol Hill,  
Providence, RI**

Questions concerning this solicitation may also be faxed to the Division of Purchases at (401) 222-6387 no later than **10 April 00 at 12:00 Noon**. Please reference the RFP / LOI number on all correspondence. Answers to questions received, if any, will be discussed at the pre-proposal meeting and included in the meeting summary.

**SURETY REQUIRED: No**

**BOND REQUIRED: No**

**Jerome D. Moynihan, C.P.M., CPPO**  
**Administrator of Purchasing Systems**

Vendors must register on-line at the State Purchasing Website at [www.purchasing.state.ri.us](http://www.purchasing.state.ri.us).

**NOTE TO VENDORS:**

Offers received without the entire completed three-page RIVP Generated Bidder Certification Form attached may result in disqualification.

**THIS PAGE IS NOT A BIDDER CERTIFICATION FORM**

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## 1. Project Introduction:

The Rhode Island Department of Administration/Office of Purchases, on behalf of the University of Rhode Island, is soliciting proposals from qualified firms for the provision of voice and related communications services as described in the terms of this Request, including:

- Long distance service for URI students, URI staff, and other participating Rhode Island state agencies
- Billing and Collection services for URI students

This is a Request for Proposal, not an Invitation for Bid; as such, responses will be evaluated based on the overall merits of the proposal and not exclusively on price. There will be no public opening and reading of responses received by the Office of Purchases pursuant to this Request other than to name those bidders who have submitted proposals.

This project has been named the “URI Toll and Billing Services”. This contract will be awarded under the State’s general conditions of purchasing which are available on the Internet at: <http://www.purchasing.state.ri.us>.

### 1.1 Project Components

1.1.1 The scope of this RFP is broken into several separate but related projects. They are:

- A) Outsourced Student Billing and Resale
- B) Telecommunications Management System (TMS)
- C) Toll Services
- D) Other Services

1.1.2 A vendor may submit proposals that address any combination of items A, B, C and D.

1.1.3 The University reserves the right to make multiple awards. For instance, one vendor may be selected to provide outsourced student resale services and supporting toll services, and another vendor selected to supply the toll circuits for the University administration. Vendor should note clearly in their response if a particular offering is contingent upon award of any other section/service.

## **1.2 RFP Language**

The following terms are used throughout this document:

"Request", "Request for Proposal", or "RFP" refer to this document or the contents of this document.

"Customer", "Owner", "University" and "URI" refer to the University of Rhode Island and/or associated State institutions or agencies covered under this RFP.

"Vendor", "Bidder", or "Contractor" refers to the company, or representative thereof, offering services under this RFP.

"Proposal" and "response" refers to the documents submitted by the Bidder in response to this RFP.

## **1.3 Instructions And Notifications To Bidders:**

1.3.1 Potential Vendors are advised to review all sections of this Request carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

1.3.2 Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are acceptable. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request may be rejected as being non-responsive.

1.3.3 All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content shall be borne by the bidder. The State assumes no responsibility for these costs.

1.3.4 Bids are considered irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

1.3.5 All pricing submitted will be considered firm and fixed unless otherwise indicated herein.

1.3.6 Vendors shall provide a bid surety in the form of a bid bond or certified check to the State of Rhode Island, in the amount of \$50,000. Bid surety must be attached to the bid form. If Vendor is only responding to RFP Option D: Other Services, bid surety amount may be reduced to \$10,000.

1.3.7 The successful vendor shall be required to provide to the Office of State Purchases a performance and labor payment bond, and required insurance documentation no more than 10 calendar days from notice of tentative award.



1.3.8 Bidders are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Solicitations will be considered to be Public Records as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately once an award is made.

1.3.9 *Year 2000 Warranty* - The contractor warrants that each item of hardware, software, and firmware delivered or developed under this contract shall be able to accurately process date data (including, but not limited to, calculating, comparing, and sequencing) from, into, and between the twentieth and twenty-first centuries, including leap year calculations, when used in accordance with the item documentation provided by the contractor, provided that all listed and unlisted items (e.g. hardware, software, firmware) used in combination with such listed item properly exchange data with it. If the contract requires that specific listed items must perform as a system in accordance with the fore-going warranty, then the warranty shall apply to the State for breach of this warranty shall be defined in, and subject to, the terms and limitations of any general warranty provisions of this contract, provided that notwithstanding any provision to the contrary in such warranty provision (s), or in the absence of any such warranty provision (s) the remedies available to the Government under this warranty shall include repair or replacement of any listed item whose non-compliance is discovered and made known to the contractor in writing within ninety (90) days after acceptance. Nothing in this warranty shall be construed to limit any rights or remedies the Government may otherwise have under this contract with respect to defects other than Year 2000 performance.

1.3.10 In accordance with Title 7, Chapter 1.1, of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in this state until it shall have procured a *Certificate of Authority* to do so from the Secretary of State. The apparent low Bidder, if an out of state corporation with no business address within the state must either: 1) provide a copy of their *Certificate of Authority*, or, 2) Show proof that an application is in process prior to the bid award. Awards to foreign corporations on a "one time basis" DO NOT require a Certificate of Authority.

1.3.11 Where appropriate, Owner's representative(s) will verify Vendor trade license and audit certified payrolls for prevailing wage conformance.

1.3.12 The vendor must be certified by the manufacturer to install any products and components required for this project.

1.3.13 Work under this contract must not disrupt normal operations at the University. Vendor personnel are to conduct themselves in a professional manner, so as not to compromise the safety or self-respect of any student or staff member. The Vendor reserves the right of approval of any on-site employees, and the right to dismiss from this, and any project, any individual without a statement of cause. The Vendor will comply without compromising schedules and/or any other contract term.

## 1.4 Background and Purpose

The University of Rhode Island is a 4-year public institution of Higher Education. URI has four campuses. The main campus in Kingston, RI, the Narragansett Bay Campus which houses the Graduate School of Oceanography, the Providence Campus, which houses the Alan Shawn Feinstein College of Continuing Education and finally the W. Alton Jones campus, hotel and conference center in West Greenwich, RI. URI seeks to purchase services for all of these campuses including students, faculty and staff and guests.

Current configuration:

URI uses DMS-100 Centrex service from Bell Atlantic at the Kingston, Narragansett Bay and Providence Campuses. There is a small System 75 PBX serving the West Greenwich campus. There are 6 T1 circuits connecting the Kingston/NBC Centrex to AT&T's POP (2 admin/4 student). The Providence and West Greenwich campuses are switched access locations, and are also subscribed to AT&T for interstate traffic.

URI currently uses AT&T/ACUS to provide student resale services, including a remote access calling card, to residence hall students at the Kingston Campus. AT&T provides authorization codes in the SDN network, thus ACUS manages the SMDR polling and shut-off procedures directly with the carrier rather than through the URI Centrex system. URI does not currently offer services to students living off-campus. URI re-bills administrative telephone charges using a call accounting system from The Angeles Group, Westlake, CA. These charges are posted directly to our general ledger system.

	Kingston/NBC	Providence	West Greenwich
Staff Lines	4500	500	100
Student Lines	2300	0	0

URI provides voicemail services to our customers from 3 OCTEL voicemail servers (2 in Kingston, 1 Providence). The West Greenwich campus provides it's own voicemail from a PC based processor.

URI does not currently have a fully integrated Work Order/Inventory/Cable/toll fraud management system for our staff or students. We use several PC based Access<sup>TM</sup> databases, paper

records and are in the processing of implementing the Remedy Action Request System for trouble management and technician scheduling. Moves/Adds/Changes are currently handled by a variety of systems including CCRS (Centrex MACs), OMM (Octel MACS) plus direct access to the OCTEL server for student MACs at this time. A manual record of each update is sent to 911 and to the Angeles systems for billing. URI's current plan is to move the cable/line records into Remedy.

## **1.5 Goals and Objectives**

URI seeks a student resale solution (outsource, in-house, or outsource transitioning to in-house) that positions the University to pursue the following long term goals:

Excellent customer service for our students

Continued revenue stream to URI for technology expansion

A billing mechanism that meets our current needs and enables the University to respond to potential market opportunities such as cellular services, paging services, cable TV, internet services (including usage charges), printing services, personal 800 services, etc.

Expansion of service to off campus students billing for line and/or voicemail services

Implementation of a comprehensive work order, trouble management system that is fully integrated with our Centrex, voicemail, 911 and billing systems. The system should provide a two-way link to accept action requests from Remedy and should use Remedy to escalate and communicate with our customers.

A broader range of communication services (i.e. cellular, pagers, voicemail, calling card, personal 800 service, etc.) for the URI campus community including parents and alumni.

The University also seeks to partner with an inter-exchange carrier capable of providing toll services to its various customer groups.

## **2. Proposal Submission**

### **2.1 Bidder's Briefing**

A Bidder's Briefing will be held at the location, date and time specified in the Department of Purchases cover sheet. To verify attendance, all vendors must sign in on the attendance sheet.

The purpose of the Bidder's Briefing will be to clarify the scope and intent of this proposal, and will be conducted by staff from the Department of Purchases, *Meier&Loftus*, and URI.

Results and clarifications from the bidders briefing will be made available in writing to all attendees. If there is any variation between verbal responses made at the Bidder's Briefing and subsequent written responses, the written responses take precedence.

## **2.2 Proposal Format**

1. All responses to this RFP are to have as a first section the proper and official RIVIP Bidder Certification Cover Form, which must be downloaded from the Department of Purchases web site at <http://WWW.PURCHASING.STATE.RI.US> For technical assistance, call the Helpline at (401) 222-2142, ext 134.
2. A summary section should follow, and include
  - a description of the services being proposed,
  - a brief summary of costs, broken down by major categories
  - and an exceptions listing (by paragraph number) of any specifications that have NOT been met.
3. Finally, Vendors shall submit the itemized response following the paragraph numbering plan in this RFP. It is preferable for the Response to contain the actual text of the RFP followed by the Vendor's response to that paragraph. For each paragraph, the vendor shall respond with detailed information, describing the vendors ability or lack of ability to comply, and with any associated costs related to the specification. (At minimum, vendor shall reply with an acknowledgment that the requirement has been read, understood, and the vendor will comply.)
4. Vendor may include further sections or appendices containing drawings, planning documents, or any other supplementary information the vendor would like to include in their response.

### 2.3 Response Due Date

One original RFP responses and six copies shall be delivered in a sealed package marked with the proper Bid Number and the words:

**Telephone Services / Toll and Billing Services**

To the following office:

Department of Administration  
Division of Purchases (2<sup>nd</sup> fl)  
One Capital Hill  
Providence, RI 02895

Responses are due as described on the Office of Purchases official bid lead sheet. Late responses will not be accepted. It is the responsibility of the bidder to ensure that responses are delivered to the above party on or before the submission deadline. Note that the official time clock is located in the reception area at the office of purchases.

### 2.4 Insurance

The successful vendor shall maintain such **liability insurance** as to protect both itself and the University from any claims or damages to property and personal injury, including death, which may arise from operations under this contract, whether such operations are by themselves, sub-contractors, or anyone directly employed by, or under the direction of, either of them. Certificates of Insurance shall be filed and reviewed by the Office of Purchases before commencing work on this project.

### 2.5 Right to Reject

The State reserves the **right to reject** the proposal of any vendor that fails to comply with all of the specifications and requirements contained herein. The State also reserves the **right to reject** any or all proposals and cancel or re-advertise a new round of bidding in its own best interest. Proposals offering terms other than those contained in this RFP may be rejected.

The State also reserves the right to reject any or all subcontractors proposed by vendor, and the right to reject or approve any changes to subcontractors after the response date.

## **2.6 Evaluation Criteria**

The selection will be based on a three-point evaluation. These are: compliance to specifications (40%), vendor resourcefulness<sup>1</sup>(30%), and cost (30%).

## **2.7 Clarity of Language**

The University expects to incorporate vendor RFP responses into contractual paragraphs in the purchase and sales agreement. For example, it is important in the RFP response to guarantee calling rates in cents/minute, rather than a 'percentage off DDD'. The former provides the basis for an understandable contract where the latter could be too vague. Such vagueness could cause a strong vendor to appear weak in the evaluation and result in award to another proposal.

## **2.8 Schedules**

To assure adequate planning and execution of the Work so that the Work is completed within the number of calendar days allowed in the Contract, Vendor will prepare and maintain schedules and reports. For each of the services being proposed, graphically show the order and interdependence of all activities necessary to complete the Work, and the sequence in which each activity is to be accomplished. Include major milestones, and list the responsibilities of all parties (including URI). Submit this schedule / work plan as part of vendor response.

## **2.9 Clarifications to RFP**

See reference to Bidders conference and faxed questions on the cover page of this solicitation.

The State reserves the right to revise, modify, supplement, or withdraw this RFP at any time. In the event that it becomes necessary or desirable to revise, modify, supplement, or withdraw any part or all of this RFP, an addendum to this RFP or other notification will be issued.

Vendor will follow the format set forth by this RFP. Additional information such as marketing and sales brochures are welcome, but are in no way a substitute for the information format requested in the RFP. Non conformance to the format requested may result in rejection of vendor's proposal. Vendors are advised to respond to all system requirements detailed in each section of this RFP.

## **2.10 Exemptions to Specifications**

A vendor may request an exemption to one or more of the terms and conditions set forth in this RFP prior to the date of bid opening. If an exemption is granted to one vendor, it will be offered to all vendors as a written modification to this RFP. Requests for an exemption must be communicated, in writing, at the bidder's conference or faxed to the Division of Purchases prior to the conference, as referenced on the solicitation cover form.

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<sup>1</sup> Resourcefulness Is defined as the ability of the vendor to perform the proposed services, as demonstrated In vendor response, and the answers to the questions In section entitled Vendor Information.

## **2.11 Exceptions to Specification**

All RFP responses are expected to be in close compliance with these bid specifications. However, the University understands that not all vendors will have configurations which can comply 100% with these specifications. In the event that a specification can not be met as called out in this RFP, then the vendor's response shall have, as a separate sheet, a listing of the specifications of the RFP which have not been met. (see proposal format, above).

## **2.12 Multiple Responses**

Vendors may submit more than one bid RFP response. The University reserves the right to select the RFP response which seems best suited to its needs and to set aside additional responses from the same vendor. Each RFP response must be complete and stand on its own. Its language must be clear, free of acronyms (unless defined therein) and suitable for comprehension by a magistrate not schooled in telecommunications sciences. The vendor's RFP response will be attached to and become part of the final contract between parties.

## **2.13 Job Familiarity**

It is the responsibility of each Bidder to read and understand the requirements of the entire bid document and any appendices or forthcoming addenda as it will be incorporated into the contract documents.

## **2.14 Subcontracting**

Bidder must identify any portions of the project that will be subcontracted to another entity for completion. If subcontractors are to be used, any information requests in this RFP should be answered for both the contractor and any subcontractors.

## **2.15 Permits**

The Bidder is responsible for obtaining all municipal permits and inspections as mandated by law.

# **3. General**

## **3.1 Commencement of Services**

3.1.1 All services provided under this contract, unless specifically delayed by agreement of both parties, shall be installed, tested, and operational on or before August 1, 2000.

## **3.2 Length of service contract**

Vendor shall propose pricing and terms for the following durations:

3.2.1 Outsourced Student Billing: 1 Year term, with options to renew on an annual basis for up to 5 consecutive years. (1 yr, with 4 renewals).

3.2.2 TMS: Purchase with maintenance options for 5 years.

3.2.3 Toll Services: 1 Year term, with options to renew on an annual basis for up to 5 consecutive years. (1 yr, with 4 renewals).

3.2.4 Other Services: 1 Year term, with options to renew on an annual basis for up to 5 consecutive years. (1 yr, with 4 renewals).

### **3.3 Project manager**

It is expected that the Vendor's on-site project manager and supervisory personnel will remain constant throughout the project. Any changes in project management personnel must have prior approval from the University.

### **3.4 Addition or modification of services**

The Vendor's representative will take the lead and be responsible for the installation and coordination of all new services or modification to existing services.

### **3.5 Competing services**

No alternative program under the selected Vendor's auspices that is in conflict and/or in competition with services provided under this project shall be marketed on the URI campus. The failure of the Vendor to police and/or prohibit this may result in forfeiture of contract.

### **3.6 Problem escalation**

Please detail escalation procedures for installation and maintenance issues for each type of service being proposed.

### **3.7 Service interdependence**

If there are any services proposed where requirements to purchase entail the acquisition of any other service, please explain the relationship in detail in the appropriate section.

### **3.8 Price Protection**

Vendor shall affirm that the pricing offered the Customer shall be the lowest pricing offered by vendor to any similarly situated customer. Further, if during the contract period or subsequent renewals, the vendor should offer lower pricing to other customers, the vendor shall make these lower rates available to the University. Vendor is responsible for notifying the University in writing of the lower rate availability, and the University may take advantage of the new rates, effective immediately, by written acceptance of the new rates. Other terms and conditions of the contract will remain in effect.

### **3.9 Sample Contract**

The vendor will attach to their response copies of any executable contracts that the vendor will ask the State and/or the University to execute, should they be awarded the project under this RFP. Contracts that are submitted at a later date may be rejected, especially if they differ or conflict



with the terms outlined in this RFP or the States General Conditions of Purchase. In any event, the State of Rhode Island General Conditions of Purchases (available at <http://www.purchasing.state.ri.us/gencond.htm> ) shall control.

### **3.10 Confidentiality**

Vendor must agree to maintain confidentiality relative to all matters pertaining to URI information. Customer database remains the property of the State and/or the University of Rhode Island and cannot be used, reproduced and/or sold to a third party without the expressed permission of the respective Customer's designated representative(s).

### **3.11 Vendor Information**

Please provide the following information in an appendix to your proposal. Entitle the appendix: "Vendor Information". (A few questions may apply only to services that require technical maintenance and support. If the question does not apply to vendor's offering, answer N/A).

3.11.1 Provide a brief corporate overview (2 pages or less).

3.11.2 Describe the project team assigned to the URI project. Include names, titles, and list responsibilities for each individual.

3.11.3 Describe the number of employees, grouped by job function, that vendor currently employs nationally.

3.11.4 Describe the number of employees, grouped by job function, that vendor currently employs in the New England.

3.11.5 How many craft technicians are there in this firm's employment in the Rhode Island area who have been manufacturer-trained and certified on the systems/service being proposed? Identify the locations where the technicians are based who would be expected to provide services to URI.

3.11.6 Describe the geographical boundaries of the coverage area of the maintenance depot that would be responding to service calls from URI.

3.11.7 In an extraordinary circumstance, such as an equipment room fire, how will the vendor respond to patch in a temporary replacement?

3.11.8 How many similar installations has the vendor completed in the New England area? Please provide dates, locations and sizes of installations.

3.11.9 How does the University summon emergency service on weekends, holidays or during non-standard working hours? Give telephone numbers, alternate telephone numbers and identify parties who will respond.

3.11.10 Provide an organizational chart of the vendor's and any subcontractor's company. Include names, titles, and contact information. Include where possible at least two levels of management higher than the senior person assigned to the project.

3.11.11 Provide a narrative of staff experience. Attach resumes of key personnel.

3.11.12 Provide customer lists of similarly situated customers (include contact names and numbers).

3.11.13 Provide a list of references (include contact names and numbers).

3.11.14 Include a discussion of market share enjoyed by vendor and subcontractors.

3.11.15 Submit the most current audited financial report for the vendor (or the vendor's parent company).

3.11.16 Any other documentation that the vendor wishes to have considered may be attached to the RFP response.

## **4. Outsource Billing**

### **4.1 General**

The University currently enjoys the benefits of the ACUS student resale program. These benefits include cost competitive services for the students, minimized staffing and support requirements from URI staff, and a commission revenue stream to support Residence Hall activities.

The current service contract with ACUS will expire at the end of this academic year. The University is seeking billing and collection services to replace its current program.

Although an in-house billing system is being solicited under this RFP, it is not likely that the University will move to an in-house solution for the upcoming academic year. Any transition to an in-house system would take place, at the earliest, in the summer of 2001.

## **4.2 Basic Functions**

The billing services and resale program proposed must, at a minimum, perform the following tasks:

Student marketing and enrollment

Network provision

Call record collection

Call record processing and cost rating

Billing and collection

Customer care functions

## **4.3 Rate Structure**

4.3.1 Vendor should propose services that model the current University student offerings:

4.3.1.1 Plan 1: \$0.15/min Interstate, \$0.09/min intra-state, and

4.3.1.2 Plan 2: \$0.10/min Interstate, \$0.07/min intra-state with \$4.95 monthly charge.

4.3.2 Additionally, current market pressures are reducing the cost per minute offered to the general public, and the University may need to respond to these pressures as well. Please also propose services that offer:

4.3.2.1 Plan 3: \$0.10/min Interstate, \$0.07/min intra-state

4.3.2.2 Plan 4: \$0.7/min Interstate, \$0.05/min intra-state with \$4.95 monthly charge.

4.3.2.3 Plan 5: International calling plan option (for customers with high international usage).

4.3.3 Alternate rate plans may be offered as an option, but not as a substitute for the above.

4.3.4 Use postalized rates. Distance sensitive rate plans are not acceptable (with the exception of international).

4.3.5 Include international rates as an appendix to proposal.

#### **4.4 Network Costs**

4.4.1 Vendor shall make provisions for all trunking to support the toll calling for the student population. This network will carry intra- and inter-state toll calls. (Local calls are included in the Centrex unlimited calling service).

4.4.2 Currently there are four T-1 circuits installed to carry the student traffic. Vendor may propose a different amount of trunks to support the current traffic, but must maintain service levels at B(02) (Erlang B, 2% blocking) or better. Should blocking levels exceed B(02), (without a demonstrable increase in traffic over last year), vendor will install and maintain at their expense enough additional circuits to bring blocking back into specification.

4.4.3 All network costs, termination costs for the Centrex system, and any other costs associated with the network will be borne by the vendor. Please itemize these costs.

4.4.4 The University may wish to provide the connection T-1s between the Centrex and the vendor POP. If the University were to assume this responsibility, what impact would it have on the cost structure? How would the vendor assist in service restoration in the event of an outage?

#### **4.5 Commission Plan**

4.5.1 Vendor shall explain in detail the cost to the University for provision of these services. This figure should be expressed in the form of fixed cost per student/month, or cost-per-minute of billed traffic. Detail any assumptions made in calculating these costs.

4.5.2 Explain in detail the expected revenue to the University under their proposed plan. The traffic figures in Appendix B show the actual usage from the residence halls last year. Be sure to indicate what actual calling rates were used in the calculations. (I.e. \$0.03 cents per minute for network, \$0.025 per minute for billing services and overhead, \$0.025 profit, leaves \$.02 for the University).

4.5.3 Note that in the figures listed in Appendix A, in-state toll calls were carried by AT&T. Vendor should note that Rhode Island is currently revising their local calling areas, and some if not most of the in-state toll traffic may no longer be chargeable, and will be included in the unlimited calling area for students. Starting in the fall of this year, all calls to the Providence exchanges will be no charge from anywhere in the state. Further, calls from Kingston to the Westerly exchanges will be free beginning in December 2000.

#### **4.6 Taxes, fees and surcharges**

Vendor will be responsible for collecting and disbursing any surcharges, taxes, or fees as required by federal, state and local regulation.

#### **4.7 Toll fraud**

What is the Vendor's commitment in supporting the Customer's ability to protect against toll fraud? Does the Vendor provide an intelligent surveillance of customer calling patterns? Please define and explain programs, vendor and customer liability, and protection options and associated costs.

#### **4.8 Student bill collection**

Student bill collection will be the vendors sole responsibility. Please describe collection procedures in detail, for current and delinquent accounts.

#### **4.9 Bad Debt**

Vendor shall be responsible for absorbing all bad debt. Last year bad debt was less than 3%. (Note: Should vendor take exception to this provision, vendor will suffer a 6% penalty during the cost analysis.

#### **4.10 Credit Limits**

Vendor shall establish an initial credit limit for students of \$150.00 USD. Vendor shall monitor usage, and use voice announcements to notify students if they are approaching credit limits. If a credit limit is reached, what steps will vendor take to resolve situation? (Include policies for increasing credit limit, warning notices, account deactivations, grace periods, etc.)

Will the vendor issue advanced warning when credit limit is approached? What steps are required of customer to reactivate the account? How often are accounts reviewed? Are accounts disabled automatically or is human intervention required? Are accounts reactivated automatically or is human intervention required? Describe any changes to the above procedures during night/weekend/holiday periods.

#### **4.11 Special Circumstances**

The University shall be authorized to extend credit and payment due dates for up to 50 customers per semester. This credit will only be extended for special cases, such as students under distressed personal circumstances, students living in residence halls outside of normal occupancy schedules, etc. The University shall determine who qualifies for this credit extension, and will take responsibility for any bad debt that may result from the extension. Vendor shall not impose late fees for delayed payments.

#### **4.12 Business "PIN" Codes**

The University desires to offer our Residence Hall coordinators "business" PIN codes. These PIN codes should offer all of the functionality of a student PIN code (including remote access). Charges against these PIN codes should be billed to a single invoice, and subtracted from commissions or collected revenues, before balance is sent to URI.

#### **4.13 Automatic student enrollment**

The Vendor will automatically enroll all residence hall students at the start of each semester in all resale programs and have all requisite student information organized in an appropriate package for

distribution. This package shall include a wallet sized pre-printed card with PIN number. Vendor shall receive an electronic file of student information during the last week in July, and again the last week in December (for second semester).

#### **4.14 Marketing Plan**

4.14.1 Vendor will be expected to provide active marketing functions to publicize and enroll students in the resale program. Communication to the student body is to be regular, consistent, and in harmony with the goals of the University.

4.14.2 An introductory information package, generated from the pre-registration, shall be prepared and distributed to each resident. This package must be prepared and ready for mailing to the students home address by the first week in August and the first week in January (for second semester).

4.14.3 The successful vendor must use the URI-developed *Ram Connection* marketing name for the promotion of all associated products. The University reserves the right to review and ask for modification for all marketing materials.

4.14.4 All communications to the student body must be approved by the University prior to release.

4.14.5 Please describe the methods and tools that will be used in marketing the resale program.

4.14.6 Provide appropriate samples of marketing material used at other customer locations.

#### **4.15 Call Record Collection**

4.15.1 Currently, ACUS polls SMDR data from the AT&T SDN network. Vendor should state their ability to poll from a carrier network (and list carriers) and/or from Bell Atlantic's Centrex, and propose desired polling options.

4.15.2 Vendor shall supply and install any equipment necessary for the collection and processing of call records. Redundant equipment should be installed where loss of call records could result from equipment failure.

4.15.3 Describe in detail any memory buffers, polling equipment, or other equipment proposed. Include storage capacities.

4.15.4 The University expects that polling, processing, and credit limit checks will occur daily at a minimum. Real time is preferred. Explain in detail the frequency of these actions, and the impact this frequency has in abuse and fraud detection.

4.15.5 In the event of failure of the SMDR feed, describe how this failure would be detected and resolved.

4.15.6 In the event of an SMDR system failure that is attributable to failure of Vendor's equipment, the Vendor will be responsible for any and all charges, toll or otherwise, resulting from the failure.

#### **4.16 Billing Methods**

4.16.1 The billing date shall be on or about the 28<sup>th</sup> of each month (but no later than the last day of the month).

##### **4.16.2 Paper Billing**

4.16.2.1 Please detail the method and formats for delivering monthly billing statements and call detail. Include samples.

4.16.2.2 The University mail system will be available for bulk delivery of billing statements for most residence hall students. Mailings must be prepared by vendor, and delivered, pre-sorted by Union Express mailbox number, to the University mailroom.

4.16.2.3 There are approximately 250 students that live in campus buildings, but do not have mail boxes at Union Express. These student bills will need to be mailed via US mail for all billing periods.

4.16.2.4 Vendor must send all final bills (at the end of the semesters) via US mail to the students home addresses.

4.16.2.5 Describe the billing and collection methods that will be used.

4.16.2.6 Detail what charges are levied on student invoices. (I.e., tax, PICC, USF, etc.).

##### **4.16.3 Electronic Billing**

4.16.3.1 The University is very interested in the economic advantages of using electronic delivery of monthly billing detail. Methods can include secure web server access and/or E-mail receipt. Method of delivery for monthly billing detail should be user selectable. Hard copy formats must also be available at the individual customer request.

4.16.3.2 Detail the financial impact of eliminating paper billing and mailing from the program. What would be the increase in commissions/revenue, or discounts to customer?

#### **4.17 Bill Payment**

4.17.1 Describe all ways that customers can apply payments to their accounts. (I.e. personal check, direct bank transfer, credit card, other).

4.17.2 Detail any increase in commission or discount to customers for automatic payment of credit card payment. Will Vendor support using campus debit card for payment? Please elaborate.

4.17.3 If a student makes a payment, how quickly is it posted to the student's account and how quickly can the students PIN code be reactivated? Include weekends and holidays in your response.

#### **4.18 Reports and Documentation**

4.18.1 Vendor shall provide reports on student billing operation on a monthly basis. All reports shall be delivered no later than 15 days after the end of the billing cycle. Reports should be on CD, and in Excel spreadsheet compatible format. Reports shall include at a minimum:

4.18.1.1 Call detail report.

4.18.1.2 Monthly revenue reports by category (local, intrastate toll, interstate toll, international, other).

4.18.1.3 Monthly traffic reports (by same categories).

4.18.1.4 Account report (accounts in good standing, over due, suspended).

4.18.1.5 Bad Debt summary

4.18.2 Please describe the other documentation that will be provided to the University under the vendor's program.

4.18.3 Vendor shall provide master user and PIN information in electronic file to Telecommunications Staff so they can answer customer service requests for 'forgotten PINs,', etc. Paper printout is not acceptable.

#### **4.19 Help Desk and Customer Support**

4.19.1 Vendor shall have 24-hour, toll free touch-tone account support for students. This service should include a secure environment capable of providing current balances, call detail history, and other account status information. A live customer service agent should be available upon request. Please detail the capabilities in this area, including hours of operation, holiday schedules, etc.

4.19.2 The services described above must be available during the Sunday and Monday of Labor Day Weekend (move in days). Desired hours of live customer service operation would be 9am-9pm.

4.19.3 Students shall be able to access their account information via the Internet using standard web browsers. This service should include a secure environment capable of displaying current balances, call detail history, and other account status information.



4.19.4 In addition to telephony service, will your customer service representatives answer basic questions about other URI services such as voicemail, cable TV or data connectivity? What charges or fees would be charged, if any, for this added support?

4.19.5 Please detail any other support activities that are provided, and detail any additional associated costs.

## **4.20 On-Campus Staffing**

4.20.1 Vendor shall maintain an on-campus information desk during fall registration.

4.20.2 Vendor may assign an on-campus representative to assist students and the University during the school year.

## **4.21 Other Services**

Should the University begin to offer other services (such as cellular service, pager rental, CATV, etc.), does the proposed system allow for the additional billing for these services? If so, how many services could be billed? Could percentage discounts be applied for packaged services? Are there any charges to URI for this added functionality?

## **4.22 Separation of Network option**

Does the vendor offer the option to provide all the services stated in this section with the exception of provision of the network? Please comment on vendor's ability to provide service in the following scenario:

The University recognizes that economies of scale can be realized if the administrative and student traffic is combined into one service group. Should the University contract directly with a separate long distance carrier for both administrative and student traffic, then the vendor would not provide the toll network connections to the Centrex system. Vendor would be given access to the Centrex system to control authorization codes, and the vendor's billing system would need to be tied in through an SMDR link to the Bell Atlantic DMS-100. (Note that vendor would need to distinguish between student and administrative traffic).

What would the cost to the University be for billing under this scenario?

Would the vendor absorb/credit the customer for any PIC charges associated with switching services (if PIC levied)?

How would the Vendor distinguish between administrative and student traffic (assuming students require auth codes and administrative calls do not)? Note that Bell Atlantic provides separate SMDR feeds for student and administrative traffic.

## **5. Telecommunications Management System**

### **5.1 General**

#### **5.1.1 Summary**

The University is interested in acquiring an integrated telecommunications management system (TMS). The purpose of the management system is to provide the University with access to information regarding the total telecommunications system including the actual telecommunications switch, terminals, premises distribution cabling, the voice mail system, and call accounting and billing information. This information will allow the University to manage and administer all aspects of the telecommunications system from a single user interface and single information database.

The University is primarily seeking proposals for a TMS that will provide the capability to perform the functions described in "outsourced billing" above. That is, a system to provide data collection, processing, billing, and collection services to the student population.

Preference would be given to a vendor that could provide the outsourced billing solution for an initial period, and then migrate the services to an in house system while maintaining the same platform. This migration could presumably be done at a much smaller cost than implementing a new in house system, as database collection and implementation would already be done. Further, training costs would be reduced, as University staff would already have worked with the system for at least 12 months.

Pricing will be requested herein for the SMDR, billing and accounts receivable functions of this system. This pricing will be held valid for a period of no less than 18 months from bid response due date.

The University expects that this system will be expanded in the future to include other capabilities. Pricing for these additional "modules" or services are also requested herein.

#### **5.1.2 Common Database**

The University expects that the proposed telecommunications management system will enable a common database for system administration, billing, work order generation, repair order generation, inventory maintenance, and equipment and cabling mapping. Interactive modules, constantly updating a common database will ultimately streamline installations, repairs and information retrieval.

#### **5.1.3 ODBC Compatibility**

The database and software proposed by the vendor must be Open Data Base Compliant (ODBC).

#### 5.1.4 Computing environment

The University is currently supports an NT 4.0/W2000 server environment. The University's IT group supports IBM AIX, Digital UNIX, and Oracle 8.0 (on NT). Current hardware platforms include Digital Unix Alphas and Dell 6300 servers. Where possible, vendor should propose a software solution that can be run on the existing server(s).

The help desk at the University currently uses Remedy Action Request System (ARS) software for trouble ticket generation and problem tracking. Please describe how the proposed system would integrate with the Remedy ARS to enhance customer and trouble management service.

#### 5.1.5 Web based Interactions

The TMS should have the capability to provide Web Browser based interfaces to the University community. This would include a “forms” approach to trouble reporting or service order requests, and on-line viewing of call detail and summary reports. Also included here are web based tools for Telecommunications staff to monitor system performance, examine alarm conditions, or change feature assignments on individual sets. (Describe switching vehicles supported, if any, by the system software). Recall that the current system is a DMS-100 Centrex environment.

#### 5.1.6 Functional Requirements

The requirements listed below are divided into functional groups. The University understands that the system proposed by the vendor may divide these functions into different categories or software “modules”. Please respond according to the RFP with notations where capabilities overlap between “modules”.

#### 5.1.7 Customization and Source Code

The University wishes to acquire and maintain a system that meets its needs without customization. Describe your ability to tailor your system to meet the needs outlined herein, without custom programming changes to the basic software.

Also, please describe your ability to provide source code in escrow, so that the University could maintain the software in the event that the vendor ceases to support the product.

## 5.2 Call accounting

#### 5.2.1 Sizing

The initial call accounting system will be sized to accommodate student billing needs of the University, with the capability to grow to incorporate the administrative lines as well.

Please detail the maximum capacities of the proposed system as configured. Also include the architectural breakpoints where hardware and/or software additions are required to increase system capacity. Include the costs (if any) for these expansions.

#### 5.2.2 Call Record Capacity

What is the call record capacity of the proposed system? What is its maximum capacity?

The system must be capable of receiving multiple SMDR feeds. SMDR information could come from multiple PBX's and Centrex equipment. Vendor should describe the systems capabilities to accept multiple SMDR record inputs.

Currently, Bell Atlantic provides three SMDR feeds via FTP.

#### 5.2.3 Redundant Storage and Backup

Describe options for real time redundant file storage for call records to prevent loss of data. Also detail automated backup procedures for the system. Can users access the system during backups?

#### 5.2.4 UPS Powered

The SMDR data storage and processing subsystem should be operated from an uninterruptible power supply, capable of auto shutdown.

#### 5.2.5 Account Code/ Authorization Code Management

The system must be able to provide call sorting on the telephone extension number, authorization code or account code entered. Calls placed with an authorization or account code should be cross referenced and appear on the extension detail report of the person/extension these codes are assigned to, and on a separate account code or authorization code bill.

Account and billing codes for departmental charge-back shall have up to 12 digits.

Is the system capable of producing wallet PIN cards and mailers? Please elaborate and include in cost options.

#### 5.2.6 Toll fraud and Credit Limits

Describe in detail the systems ability to monitor real time traffic for toll fraud detection. What steps can the system take automatically to restrict access and end fraud? Include both trunk group level restrictions as well as authorization/account code restrictions.

Can a pre-determined credit limit for an auth code be set, and usage monitored on a real time basis? Explain.

Will the system shut off codes based on predetermined criteria without human intervention? Explain.

#### 5.2.7 Summary Reports

Management summary reports should accommodate six levels of nested sub-reports and subtotals to match the six layers of accounting responsibility at the University. Describe system capabilities.

#### 5.2.8 Inventory Cost Allocation

It is required that the software, which calculates the allocated cost per account, contains the provision for hardware inventory and hardware cost allocation. These data should be station specific and not merely a global percentage or uniform cost. The hardware file should be able to be culled from the database for study by the University staff and for inventory reconciliation, budgeting and depreciation calculations.

#### 5.2.9 General Ledger

Report and billing results must be transferable to the University's general ledger system for automatic transfer of account funds. Vendor will be responsible for providing this General Ledger information in a format acceptable to the University accounting department. Vendor may include a listing of common GL formats that are currently supported by vendor's system.

The University expects to implement Peoplesoft financial system in the near future. Describe the vendors experience with interfacing with Peoplesoft systems. Are they supported by the vendor or by Peoplesoft team?

#### 5.2.10 Surcharges and discounts

The system should have the capability to apply surcharges to specific types of calls (by call type, or by time of day, etc), and to apply discounts in the same manner as well. Describe the proposed system's capabilities in this area.

#### 5.2.11 Rejected Call Records

The system must be able to store rejected call records, and then recycle these records and apply to the appropriate billed party after the correct correlation is made. Describe the proposed system's capabilities in this area.

#### 5.2.12 Tax application

The system should be able to apply different tax rates to accounts based on type of account. Describe the proposed system's capabilities in this area.

#### 5.2.13 Prorating and Individual Exceptions

The system should be able to prorate charges based on billing cycles. Further, the system should allow individual adjustments to be entered for specific bills, to allow customer service agents to resolve issues. Describe the systems capabilities in these areas.

#### 5.2.14 Grant Accounts

A number of calls from the University are chargeable to grant accounts. In these situations, local and long distance (LD) calls must be separated. Therefore, the system must be able to allocate LD, local and message unit calls to different account numbers for the same extension or authorization code.

#### 5.2.15 NPA/NNX Codes

All tariff variables, NPA codes, NNX codes and station data base files must be user alterable by authorized staff of the Telecommunications Department.

#### 5.2.16 Simulated Call Pricing

Pricing of simulated calls is required.

#### 5.2.17 Toll and Third Party Tapes

The system must have the capability of incorporating the Bell Atlantic, AT&T, and other LEC and IEC CDR billing detail containing direct dialed, credit card, toll free, collect call and third party billing information.

The system must be able to incorporate these charges into individual extension and account charges. Vendor will be responsible for any "front end" manipulation of the data on these tapes to make the information compatible with the proposed SMDR processing software.

Where call records appear on both the PBX SMDR stream and later on the LEC or IEC toll tape, the system must be able to cross check, reconcile, and eliminate duplicate records as needed to produce accurate call detail and billing reports.

#### 5.2.18 Real Time Reports

Of utmost concern to the University is the ability to access management information from the telephone management system periodically during the month. Vendors should address the capability of providing impromptu information and reports either on-line or by request.

#### 5.2.19 Billing for Other Services

The system should have capabilities to bill for additional services such as cellular, pager, Internet usage, off-campus dial tone/voicemail/usage, and credit cards. Please detail capabilities and limitations in this area.

#### 5.2.20 Carrier Auditing

The system should have capabilities to compare the bills generated by the system against the actual carrier details and invoices for verification of vendor invoices. Comparisons should be viewable both in summary and in detail by call type, facility used, etc.

#### 5.2.21 Directory

The system should have directory capabilities. Real time on-line access to this information is required. Private (or unlisted) number parameters should be programmable.

In addition, the system should be able to export the directory information in suitable formats to produce a printed directory.

Detail the system's directory function capabilities.

### **5.3 System Management**

#### 5.3.1 System Administration

5.3.1.1 Maintain updated records on each terminal in use including but not limited to class of service provided, associated hunt groups, and associated terminal and system features.

5.3.1.2 Ability for simultaneous multiple terminal access to the maintenance and administrative systems. A minimum of three terminals shall have access simultaneously. Explain what security levels can be imposed on the access terminals, and whether they are hardware or software (password) controlled. Also include relevant information as to which parts of the TMS can be accessed simultaneously.

#### 5.3.2 Audit Trail

Ability to produce an audit trail of all transactions that have been uploaded to the switch database.

#### 5.3.3 Database reconciliation

Ability to reconcile the two databases (the PBX and the TMS), and produce a discrepancy report.

#### 5.3.4 Real Time Alarm Monitoring and Fraud Detection

Status and alarm reports should be automatically sent to appropriate personnel when predefined thresholds are exceeded. For example, the system should be able to send an e-mail to the telecommunications technician when calls begin to overflow to a more costly trunk route, or notify the telecommunications manager if certain thresholds are exceeded. (For example, - simultaneous calls on the same PIN, unusual activity on a PIN, unusually large international traffic, etc.). URI prefers that this monitoring be done in real time.

Detail the frequency of call record polling (if applicable) and analysis. Elaborate on how fast the system can respond to fraud activity.

Explain the capabilities of the system to automatically disable accounts. Are disabling actions programmable by time of day and day of week?

#### **5.4 Cable Management**

System shall be capable of maintaining records of cable and infrastructure deployed on campus. This includes cable and wiring data base records that correlate station identification numbers with location, jack, wire pair (station wire) identification, IDF appearance, distribution or backbone cable pair, and MDF and CDF appearance. The system will be able to maintain records of all wiring from the CDF, to the individual station jack.

In addition, vendor should detail the ability of the system to maintain records on data equipment (hubs, switches, routers) port assignments, and on CATV drop information.

URI currently uses SPECTRUM for network management and INSITE for building wiring CAD diagrams. Please explain how the proposed system would interface with these systems.

Please provide a description of any other cable management capabilities.

#### **5.5 Work Orders**

System should be capable of monitoring and managing work orders such as trouble reports or move/add/change requests. Work orders, once entered into the system, will stay open until closed by telecommunications staff. Upon closing (completion) of the order, the central database shall automatically be updated with pair changes, equipment or feature additions, extension and set type information, etc. This action should also automatically update equipment cost allocations for the next billing cycle.

The system should be able to:

5.5.1 Provide and maintain history of total system troubles including trouble response and clearing times.

5.5.2 Maintain history of maintenance performed or required.

5.5.3 Provide interactive capability between inventory management and trouble reporting system.

5.5.4 Explain any other capabilities, including methods of access for work order input and updating.

#### **5.6 Equipment Inventory**

System shall be equipped for the capability to manage the inventory of equipment on campus. This includes telephone sets, add on modules, cell phones, pagers, data equipment (such as hub or switch port, etc.), and CATV receivers.

The system must maintain a running inventory of spare parts and telephone sets as well. When a repair order is closed indicating that a telephone set was replaced, inventory files should be updated to show the addition of one type xyz set for repair, and reduce the inventory of spare equipment by one xyz set.

Inventory reports should warn management when spares levels reach a predefined threshold, indicating the time to re-order.



## **5.7 Reporting and Printing**

### **5.7.1 Paper Report Formats**

Initially, the primary reporting structure will be paper printouts. Please detail the printer hardware and software requirements for the system.

### **5.7.2 Electronic Report Formats**

The preferred reporting method will be electronic files. This may be at least e-mail or preferably WWW based. Vendor should propose the software and hardware necessary to accomplish this. Security of information should be addressed, i.e., how does the vendor prevent unauthorized person(s) from accessing call record details intended for another manager, etc.

### **5.7.3 Student Cost Allocation Reports**

The student resale/billing system must be capable of generating the bills and reports listed in under Outsourced Billing. Please include samples.

### **5.7.4 Administrative Cost Allocation Reports**

In addition to supporting the telecommunications requirements of the University, the telecommunications department serves as a cost center for departmental charge backs for telephone usage. As such, a telephone management system should be able to provide detail and summary reports to help support this function.

Please describe the standard and customized reporting features of the system.

### **5.7.5 How does the system handle caller paid calls? (I.e. cell service that requires the calling party to pay for the call)**

### **5.7.6 Please also describe the standard and customized reporting features of the system for information such as:**

- exception reports,
- excessively long duration,
- operator assisted calls,
- management reports,
- Traffic Analysis and Network Optimization Reports.

### **5.7.7 Provide sample reports as attachments to your response.**

## **5.8 Costs**

Bids for option B, TMS, shall be valid and irrevocable for a period of no less than 18 months from bid submission.

### **5.8.1 Hardware Costs**

Please itemize cost information for a call accounting system as described herein. Include the following:

#### **5.8.1.1 Computing platform and printing equipment.**

This pricing is requested separately so that the University can evaluate the option of running the Vendor software on existing in-house computing facilities. (Preferred hardware is listed under computing environment). Itemize any software licenses included so that URI can subtract costs for any licenses already in place.

#### **5.8.1.2 A high speed laser printer to allow for the printing of student bills and management reports.**

### **5.8.2 System Costs**

Please detail the cost items requested in the following sections. Be sure to indicate any interdependencies between modules. (I.e., 'work order' cannot be installed without "inventory" module.)

#### **5.8.2.1 Student Resale module**

Detail the costs associated with the student resale requirements as described here and in the section "Outsourced Billing". Include any ancillary equipment such as call record buffers, etc.

#### **5.8.2.2 Work Order Modules**

What is the cost of adding work order capability? Are there additional hardware costs?

#### **5.8.2.3 Cable/Facilities**

What is the cost of adding facilities management capability? Are there additional hardware costs?

#### **5.8.2.4 Inventory**

What is the cost of adding inventory management capability? Are there additional hardware costs?

#### **5.8.2.5 Administrative billing (if different from student module)**

5.8.2.6 PBX System Management (list systems supported, and interoperability with DMS-100 in a Centrex environment).

5.8.2.7 What is the current cost for upgrades in system software? (If not fixed, provide cost of last two system upgrades.

5.8.2.8 Please provide pricing to update quarterly the NPA/NNX, rate and costing tables for the SMDR system. Updates are to be performed by the vendor.

#### 5.8.2.9 Services Summary

Provide a detailed listing of all services and support being proposed. For example, database creation and input, customization, SMDR billing interface design, etc. Also, indicate what costs URI would incur for services beyond those listed in your proposal. Include types of services available and rates.

#### 5.8.3 Migration from outsourced billing service

Please provide a narrative and detailed cost discussion on how the University would accomplish the migration from an outsourced billing service to an in house system. If the in house system is the same system proposed under "outsourced billing", explain what benefits the University can realize by staying on the same platform and migrating to the in-house system. Include both operational and economic benefits.

#### 5.8.4 Maintenance

Please quote the cost of a full service maintenance contract for the TMS software and associated systems. Itemize the charges for the different portions of the system, including any hardware. This contract would begin at the expiration of the warranty period.

Will the vendor agree to cap this cost for a period of five years from system installation?

#### 5.8.5 Training

Four URI employees will be trained and certified by the vendor on system administration and operation.

What is the cost of these classes, including books? Is this training able to be delivered on-site?

The University will have up to thirty-six months to register students for this training.

## 5.9 Warranty

Warranty Period: The vendor shall maintain the entire installation for a period of twelve (12) months from the date of Acceptance<sup>2</sup>. The vendor shall not assign the maintenance responsibility to any third party without the written authorization from URI. All installed components that carry a guarantee from the OEM (manufacturer) that is longer than eighteen months shall be guaranteed for the duration of the manufacturer's guarantee.

In addition, vendor shall certify that any hardware and software proposed will be supported by the vendor for a period of at least ten (10) years after the Acceptance date, and the University will not be required to upgrade any software or hardware to be eligible for that support.

## 6. Toll Services

AT&T currently provides:

- dedicated interstate and international service for staff at Kingston/NBC
- switched interstate and international service for staff at Providence and West Greenwich.
- (also dedicated intrastate toll, interstate, and international service for students in Kingston).

Bell Atlantic currently provides:

- switched in-state local and intrastate toll service for all staff at all locations.
- (also free local calling for students as part of the student residential Centrex service.)

The University is seeking postalized rate services for its staff at these locations, including

Local and Toll services

800 inbound

Calling card.

Information on calling volumes is included in Appendix B.

### 6.1 Network Cost Information - Dedicated Access

6.1.1 Please detail the cost per minute for interstate toll calls. Include rates for all service areas (I.e. continental US, Alaska, Hawaii).

6.1.2 Please detail the cost per minute for intra-state toll calls. Include rates for all service areas.

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<sup>2</sup> Acceptance Date Is defined as the date of the letter written by the University's Telecommunications Director or his designate consultant certifying that the installation substantially meets the specifications of this RFP and the terms of the Sales Contract between the parties.

6.1.3 Please detail the cost per minute for in-state local calls.

6.1.4 Please detail the cost per minute for international calls.<sup>3</sup>

6.1.5 Please detail the costs and services available for Directory Assistance.

6.1.6 What other costs are associated with this service?

6.1.6.1 T-1 charges,

6.1.6.2 CSU/DSU provision,

6.1.6.3 one-time installation,

6.1.6.4 all other (please specify)

6.1.7 Usage Minimums

Detail any usage minimums that are required for all proposed rates. Include factors that define usage (such as average monthly = last 3 month average, last 6 month, 12 month, etc.)?

## **6.2 Network Cost Information - Switched Access**

6.2.1 Please detail the cost per minute for interstate toll calls. Include rates for all service areas (I.e. continental US, Alaska, Hawaii).

6.2.2 Please detail the cost per minute for intra-state toll calls. Include rates for all service areas.

6.2.3 Please detail the cost per minute for in-state local calls<sup>4</sup>.

6.2.4 Please detail the cost per minute for international calls<sup>3</sup>.

6.2.5 Please detail the costs and services available for Directory Assistance.

6.2.6 What other costs are associated with this service?

6.2.7 Usage Minimums

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<sup>3</sup> These rates are commonly listed as a percentage of direct dial rates. This is acceptable, include current country and rate listings as an appendix to the response.

<sup>4</sup> The University understands that this service is not available from many vendors. In this case, vendor may respond "not available".

Detail any usage minimums that are required for all proposed rates. Include factors that define usage (such as average monthly = last 3 month average, last 6 month, 12 month, etc.)?

### **6.3 PIC charges**

Will the vendor absorb/credit any PIC charges associated with switching service to the vendor's network?

### **6.4 USF/PICC charges**

Please describe your policy on PICC / USF charges, and how these charges would be applied to URI. Will the Vendor agree to cap these charges, or otherwise offset calling rates, to protect URI from any future increases to these charges?

### **6.5 Calling Cards**

6.5.1 Calling card services for faculty and staff are required. The University currently has 100 calling cards distributed and in service.

6.5.2 Vendor shall deliver 200 calling cards to the Telecommunications department for distribution.

6.5.3 Detail the usage rates for calling card calls. Include cost per minute, call set-up fees, and any other associated charges or surcharges.

6.5.4 Billing reports for these calling cards shall be delivered to the University in CD format for upload into the administrative billing systems (Angeles Group). Provide the call record format and file types for this CD.

6.5.5 What is the vendor's policy relative to illegal use of a customer's credit card by a third party? How is the fraud detected? Is the card automatically deactivated? Can the customer control this deactivation threshold? How is this illegal use to be reported by the customer? What is the customer's liability?

6.5.6 The vendor shall only accept orders for service activation/deactivation from authorized URI personnel. The University will provide the successful vendor with a list of those employees who are authorized to activate/deactivate service.

### **6.6 Toll Free Services**

6.6.1 Transition of 800 numbers

The University current has ten (8) inbound interstate 800 numbers. The current carrier is AT&T. The University current has seven (7) inbound intrastate 800 numbers, carried by Bell Atlantic.

Vendor will be responsible for the transition of all toll free numbers to the new carrier. This transition is to be coordinated and scheduled to allow for a seamless transition (no "out of service" time for the 800 numbers). A list of toll free numbers will be provided to the successful bidder.

6.6.2 Detail the calling rates for inbound 800 calls. (Separate intra-state and interstate as necessary).

6.6.3 Detail any other charges/surcharges for inbound toll free calls.

6.6.4 Vendor shall provide monthly call detail reports for all 800-line activity. This information shall be provided on CD. Provide file and call record format. Can the vendor include the 800 lines call records on the same billing CD as the inter/intra-state traffic?

6.6.5 Provide information on how customer can customize routing of inbound calls by time of day. How is this customization accomplished? How often and how quickly can this be accomplished? Include any costs or charges associated with these reconfigurations.

6.6.6 Can the vendor provide intercept recordings if the caller is placing a call from an area that is normally toll free? (I.e. an in state caller who could call locally for free, but is using the 800 number).

6.6.7 Can the 800 numbers be configured to route to other types of facilities (DID circuits) in the event of circuit failure or sudden increase in calling volume? Are there any charges would be associated with these 'reroutes' or 'overflows'?

6.6.8 Detail the types of reporting available to the University, such as call origination summaries, details, etc. Include how the information is presented, I.e., sorted by area code, etc.).

## **6.7 Reliability**

6.7.1 Describe the configuration of the proposed toll circuits. Include serving office locations, methods of transport (fiber, microwave, etc.), size and speed of main trunking paths, etc.

6.7.2 Discuss reliability measures in place, including redundant paths, circuits, and central office equipment.

6.7.3 In the event of a failure of toll circuits, please describe recovery procedures, for both the customer (URI) and the vendor.

6.7.4 The University will be eligible for reimbursement for any down time for any facilities delivered under this contract.

6.7.5 Should URI need to route calls over alternate circuits due to failure of the vendor's toll services, the University shall be compensated by the vendor for any additional costs associated with this alternate routing.

## **6.8 Billing Records**

The vendor will supply one CD-ROM to the University. This CD will contain all call detail records for all services provided by the vendor. If multiple CD's are required because of the different services, please explain.

The vendor will also supply a monthly toll tape to the State of RI for any subscriptions under their custodianship (see below).

## **6.9 State and Governmental Agencies**

In addition to the URI traffic, the rates proposed shall be made available to other State, governmental, and/or local municipalities. Each Agency will be liable for its own obligations incurred under any contracts that may be awarded as a result of this RFP. The large majority of these locations are switched access, with one or two possibly moving to dedicated T-1.

The traffic information for these locations is not included herein, as it is expected that the traffic from URI alone will qualify for the deepest discounts.

However, please detail the rates for various traffic volumes and their associated discounts for both switched and dedicated access. Should the combined traffic of URI plus the State and Municipality locations reach the next discount level, URI will notify the vendor of the additional subscriptions and have the deeper discounts applied to all customers.

Will the vendor agree to waive any PIC charges incurred by switching to the vendors network?

## **6.10 Combined Student/Admin Network**

The University recognizes that economies of scale may be realized if the administrative and student traffic is combined into one service group. Using the traffic information in Appendix B, please detail what impact on network costs and calling rates would result from combining the traffic of the students in with the administration/staff traffic. Please be thorough and specific.

## **6.11 Term Discounts**

6.11.1 Please detail the discounts for longer term agreements (2,3, and 5 year).

6.11.2 The contract term for service requested herein is one year with options to renew annually for up to four more years. Should the University opt to renew for annual extension(s), and this extension makes the total term of the contract equal to one of the term discounts described above, the University shall be entitled to receive the deeper term discount. Further, the University shall receive a credit, retroactive from the beginning of the contract, for the difference between the quoted one-year rates and the term-discounted rate.

## **6.12 Time of Day Discounts**

Detail any time of day/day of week discounts applied to the above quoted rates, and list hours (EST) for each category.



## 7. Other Services

The University is interested in future offerings to the off-campus student, faculty/staff, parents, and alumni population. The goal is to expand the "university community" by offering branded services to off campus, private residence and rental locations.

Vendors are encouraged to include any service capabilities that may further this University goal. All services should be marketed under RAM Connection brand. The same level of approvals and authorizations from the University will apply to these programs as they would with the on-campus services.

Some typical offerings are listed below. Vendor may propose other offerings as well.

- Off-campus private residence toll and billing service.
- Paging Services
- Cellular
- Residential toll free (800) services
- Calling Card Services
- 800 origination commissions
- Local termination commissions
- 0+ calling commissions

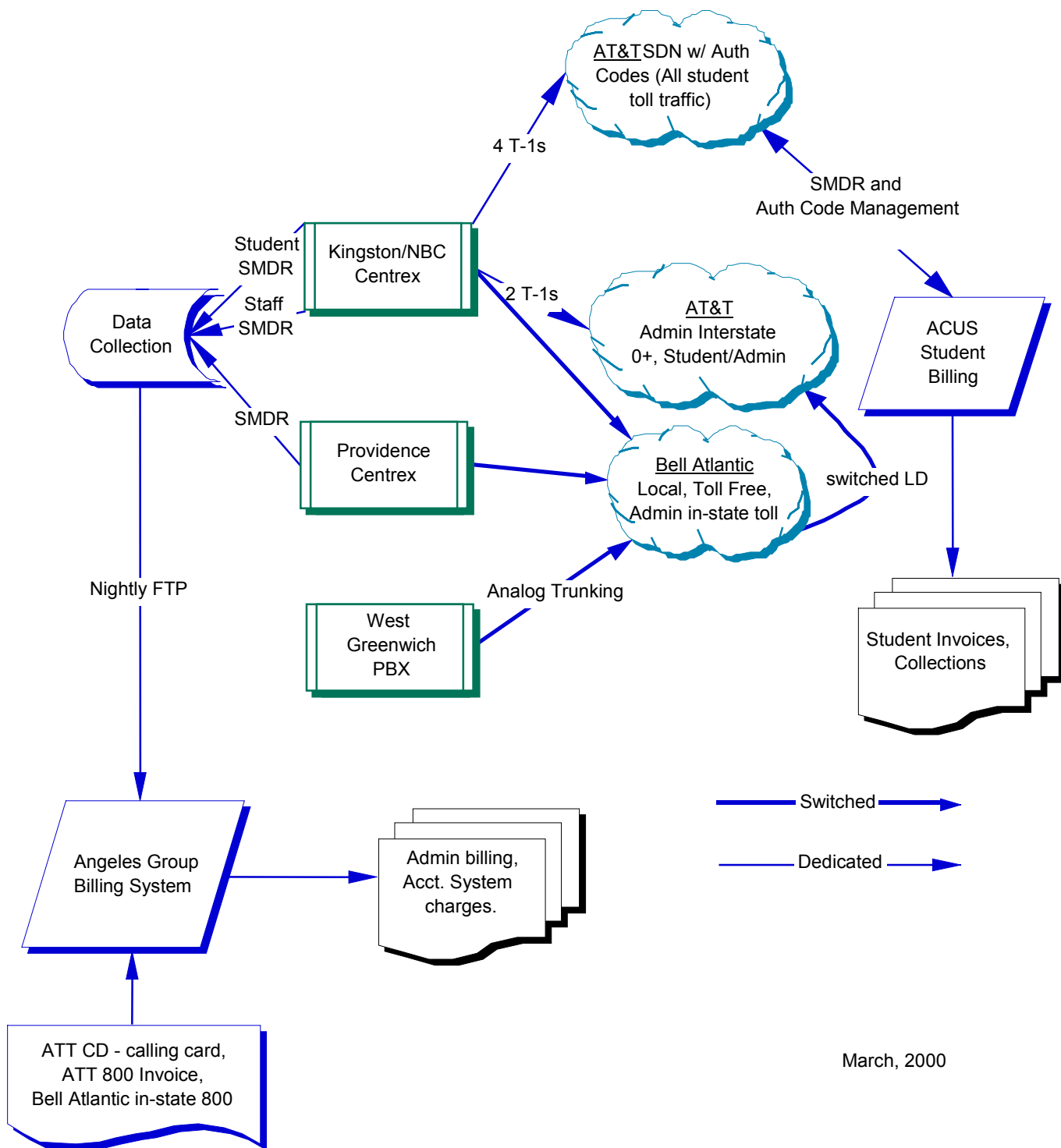
For each type of service being proposed, provide the following:

7.1.1 Please include costs and rate structures, commission details, basic logistics, and responsibility information. (I.e. Customer would choose ABC as their carrier, use their University supplied authorization code, and receive private billing at X-cents/minute for interstate toll calls.). Bids for option D, Other Services, shall be valid and irrevocable for a period of no less than 12 months from bid submission.

7.1.2 Explain how service would be marketed, billed, collected, etc. In the case of commission plans, how would service be measured and authenticated? How would commissions be paid- as a credit, by check, etc.?

7.1.3 Detail additional volume discount levels/ commissions available to the University should traffic be generated under any of the affinity programs being proposed.

## Appendix A: URI Network Diagram



March, 2000

## Appendix B: Traffic History

### Traffic Information

Traffic Information - Students and Residence Halls

MINUTES	Intrastate	Interstate	International	Total
Dec-98	149,330	335,179	1,736	486,245
Jan-99	144,330	301,995	2,968	449,293
Feb-99	200,886	414,919	3,464	619,269
Mar-99	147,851	297,697	3,117	448,665
Apr-99	199,517	438,942	2,797	641,256
May-99	62,397	128,744	968	192,109
Jun-99	11,792	23,034	70	34,896
Jul-99	8,862	18,837	146	27,845
Aug-99	20,180	42,915	457	63,552
Sep-99	255,291	561,084	5,071	821,446
Oct-99	233,125	448,129	3,925	685,179
Nov-99	181,439	373,245	3,478	558,162
12 Month Total	1,615,000	3,384,720	28,197	5,027,917

CALLS	Intrastate	Interstate	International	Total
Dec-98	32,865	47,225	214	80,304
Jan-99	30,614	42,793	348	73,755
Feb-99	43,423	58,715	324	102,462
Mar-99	32,562	43,810	315	76,687
Apr-99	44,555	63,116	327	107,998
May-99	15,468	20,148	113	35,729
Jun-99	2,437	2,943	16	5,396
Jul-99	2,088	2,169	40	4,297
Aug-99	4,866	6,335	45	11,246
Sep-99	54,210	78,255	493	132,958
Oct-99	50,094	63,679	433	114,206
Nov-99	40,924	53,245	396	94,565
12 Month Total	354,106	482,433	3,064	839,603

Table 3: Student Traffic (minutes, and number of calls)

Traffic Information - URI Administration (minutes, 1999)

ADMIN MINUTES	Local	Intra-state	800 Intra-state	800 Interstate
Jan-99	N/a	148618	1259	3429
Feb-99	N/a	254608	2807	2158
Mar-99	N/a	193624	2960	2675
Apr-99	N/a	219235	5167	2871
May-99	N/a	224289	8562	2860
Jun-99	N/a	194985	9372	2623
Jul-99	N/a	161932	7442	2860
Aug-99	N/a	187470	7831	2846
Sep-99	N/a	223821	3657	4095
Oct-99	N/a	204486	4627	4557
Nov-99	N/a	283985	3657	3941
Dec-99	N/a	202006	1996	2750
Total	2,906,792	2,499,059	59,337	37,665

\* N/a – Not available

URI - Admin	Interstate Switched	Interstate Dedicated	International	Directory Assistance	Calling Card Intra-state	Calling Card Interstate	Calling Card International
Jan	8515	126231	6307	1382	1984	14284	913
Feb	8750	135416	5217	1140	1724	8400	1092
Mar	10556	159113	5678	1080	2484	11684	1793
Apr	10754	142278	5903	936	2080	10128	1076
May	10953	125443	6131	794	1677	8572	360
Jun	8557	119126	7039	538	902	6905	633
Jul	9694	105541	5559	530	1026	9503	697
Aug	8203	124992	4936	513	1203	9359	633
Sep	8395	121488	6750	555	1361	8866	392
Oct	8917	132201	6605	864	870	9371	207
Nov	7238	125113	50202	961	886	8777	237
Dec	6220	110034	4610	1004	1458	10032	623
Total	106752	1526976	114937	10297	17655	115881	8656

Traffic Information - Other Agencies (minutes, 1999)

Agencies	Interstate Switched	International Switched	Local	RI Toll	Instate 800
State of Rhode Island	2738292	19462	34,436,721	7,239,571	1,358,344
RIC	234147	2977	1,558,843	129,911	N/a
CCRI	171882	590	1,227,458	358,685	N/a
Cities & Towns	480668	2382	N/a	N/a	N/a